



**Wisconsin  
Conservation  
Voters**

# PLANNED GIFT STATEMENT OF INTENT

## MONARCH SOCIETY

As an indication of my/our desire to provide a legacy of support to Wisconsin Conservation Voters and Wisconsin Conservation Voices, I/we hereby inform Wisconsin Conservation Voters and Wisconsin Conservation Voices that I/we have made a provision for a gift in my/our estate plan. I/We understand that this commitment is revocable and can be modified by me/us at any time.

### Donor Information

Full Legal Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

### Donor Recognition

Yes, you may recognize me/us in donor lists and at events.

Please list my/our name as follows:

\_\_\_\_\_

I/We prefer to remain anonymous during our lifetimes, but you may recognize me/us after my/our gift is given.

I/We prefer to remain anonymous.

### Signature

\_\_\_\_\_  
*Donor signature*

\_\_\_\_\_  
*Donor signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date*



Wisconsin Conservation Voters  
133 S. Butler St., Ste 320  
Madison, WI 53703  
[conservationvoters.org](http://conservationvoters.org)

Federal Tax ID: 39-2018854  
*Wisconsin Conservation Voters is a 501(c)(4) organization.*



Wisconsin Conservation Voices  
133 S. Butler St., Ste 320  
Madison, WI 53703  
[conservationvoices.org](http://conservationvoices.org)

Federal Tax ID: 73-1628891  
*Wisconsin Conservation Voices is a 501(c)(3) organization.*

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## Description of Gift

- Bequest through Will or Revocable Trust
- Charitable Trust
- IRA/Retirement Plan Beneficiary
- Life Insurance Beneficiary
- Bank/Brokerage/Other Financial Account
- Real Estate *(please describe)*: \_\_\_\_\_
- Other: \_\_\_\_\_

## My Future Gift

- Is a percentage of my/our estate: \_\_\_\_\_ %
- Is a specific amount: \$ \_\_\_\_\_
- Confidential in its value
- With the understanding that values are subject to change, at this time I/we estimate the value of my/our gift to be approximately \$ \_\_\_\_\_ in today's dollars.

*By stating an amount, the donor is not legally bound by this statement and the donor may choose to add, subtract, or revoke this gift at any time. Decision making is at the sole discretion of the donor.*

## Purpose of Future Gift

- This gift is to be unrestricted and may be used where the need is greatest at **Wisconsin Conservation Voters**, a 501(c)(4) organization.
- This gift is to be unrestricted and may be used where the need is greatest at **Wisconsin Conservation Voices**, a 501(c)(3) organization.
- Other: \_\_\_\_\_